

# FermiMail Calendaring: Room Migration Training



**ROOM CALENDAR MIGRATION PREPARATION**

**APRIL 6-10, 2012**

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**Last Update: 4/9/2012 – semi-automatic procedures to  
help migrate MM to-do's and banners to FermiMail**

# Meeting Agenda



- **Migration Day and Timeline – 20 min**
  - Room Calendars
  - Related Migrations: User Calendars, Group Calendars, etc.
  - Experience from Pilot
  
- **Crash Intro to Outlook – 15 min**
  - Start/stop the app; profiles and cache
  - Create/modify/delete a meeting
  - Server vs. Local Calendars
  
- **MM Room Calendar Migration – 55 min**
  - Overview and Setup – 15 min
  - Practice: Export, Convert, Import, Polish – 35 min (room available longer)
  - Clean-up: avoid leaving your account specifics on training PC – 5 min
  
- **Documentation:**
  - [http://computing.fnal.gov/xms/Services/Getting\\_Services/FermiMail/Calendar\\_Migration](http://computing.fnal.gov/xms/Services/Getting_Services/FermiMail/Calendar_Migration)

# Migration Day and Timeline



## **FERMIMAIL CALENDAR MIGRATION: WHAT, WHEN, HOW/WHO**

[http://computing.fnal.gov/xms/Services/Getting\\_Services/FermiMail/Calendar\\_Migration](http://computing.fnal.gov/xms/Services/Getting_Services/FermiMail/Calendar_Migration)

# Room Calendar Data Migration Timeline



- **March 20, 2012 – Flag Day 1: Pilot – Computing Sector**
  - Mostly went very well, very fast room migration. There *were* rough edges though:
    - Unexportable events in MM. Large calendars challenge to import.
      - Only affects 4 CS and 4 FESS room calendars
    - Exported calendars in two pieces
      - Recents: Jan 1, 2012 and later – migrate event-by-event
      - Ancients: Jan 1, 2006 to Dec 31, 2011 – bulk import to room later
    - Converted all known unsupported recurrence patterns, but
      - 2/400 “not a calendar file” errors – manually recreated events in Outlook
- **April 12-16 – Flag Day 2**
  - April 16: DIR, PPD, FCPA – location WH1N
  - April 13: BSS, FIN (Lotus rooms) – distributed
  - April 12: Everyone Else – distributed
- **May 15, 2012 – Meeting Maker goes offline**
  - No system will remain. MM really goes away.

# Room Calendar Data Migration Support



- **April 16, 2012: DIR, PPD, FCPA**
  - We will do migration in WH1N at 9am.
  - All support personnel will be there.
  
- **April 13, 2012: BSS, FIN (Lotus rooms)**
  - Only 2 room admins involved, so will work at their locations.
  - Support personnel will circulate, familiar with Lotus and Outlook event entry.
  
- **April 12, 2012: Everyone else**
  - We will have someone stop by to make sure you are able to start...
  - Support personnel will circulate, familiar with MM and Export/import.
  - Migrators will have my cell phone number to help insure quick response time.
    - Expect email April 11, 2012 with start-up and support details
  - FESS, like CS, has unexportable events in 4 room calendars
    - Mostly in 2009-2011. So, can get recents (Jan 1, 2012 and later) exported OK.
    - We have identified most of the events... can help “disconnect” them.
    - (We’ll contact meeting organizers to have meetings deleted before user migration)

# The Rest of The Calendar Data Migration Timeline



## ➤ April 17-20 – User Calendar Migration

- Users: March 01, 2012 and later is all that is migrated by service
  - Opt-in email went out to help cover areas where response uncertain
  - If spreadsheet response certain (FESS, some of DIR), then please let us know
  - Procedure to archive more (or migrate more) is posted online
  - Unexportable events exist in MM, mostly just in CS and FESS rooms.
- VIPs: Jan 1, 2006 and later is available – but limited spots
  - Very effort intensive, requires coordination with Admin staff (calendar caches)
  - [Semi-automatic procedures to move to-do's and banners too.](#)
  - Time and migrated details to be arranged. Expect ~2h per VIP calendar.

## ➤ April 23-27 – Shared/Group/Other Calendar Migration

- We need to work with calendar “owner” to map to new service
  - A line mgmt group calendar is automatic now: “Team Calendar”
- Many Group Calendars are no longer needed, supported specific events

# Post-Migration, Challenges to Expect



- **The Big Topic: Calendaring Sharing and Delegation**
  - Not the same thing, though delegation can be used for calendar sharing
    - Delegation: more appropriate for an assistant acting on behalf of a manager
    - Delegation: more appropriate when sharing more than just calendar.
    - Calendar Sharing: for read-only sharing of your calendar to colleagues
  - *Known issues with setting up delegation and calendar sharing from Outlook 2011 (Mac) – being worked.*
    - Can use Outlook 2010 for delegation
    - Can use Outlook 2010 and OWA/webmail for calendar sharing
    - Does not affect delegates
    - Only affects the person doing the delegation/sharing on Outlook 2011.
- **Categories – alternative to multiple calendars per person**
  - Users who use different clients (Outlook 2010, Outlook 2011, OWA/Webmail) will notice that category name choices and especially colors are not necessarily the same across all clients. Color settings are not always uploaded to server. You can fix this yourself, but it is a surprise to users that this is not fully automated yet in the product.
- **Internet Calendaring... for no-login read access to calendars**
  - CS, Experiments, and OPOD Training Rooms may be interested in this.

# Other Surprises After Migration



## ➤ Calendar Automation

- Team Calendars – great plus! Replaces many “group” calendars
- Overlay Calendars – very nice.

## ➤ Some Folders have Special Purpose

- User on non-Outlook client notices lots of “extra” folders... and should NOT use them directly. Draft document on using Thunderbird and Outlook both and having them “play nice” together.  
Examples:
  - Calendar
  - Contacts
  - Journal
  - Notes
  - Suggested Contacts
  - Tasks



# Crash Course on Outlook



**ENOUGH OUTLOOK INFORMATION TO PERFORM THE  
MIGRATION**

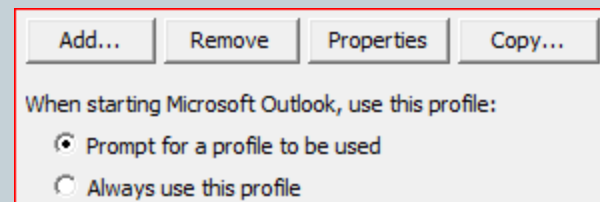
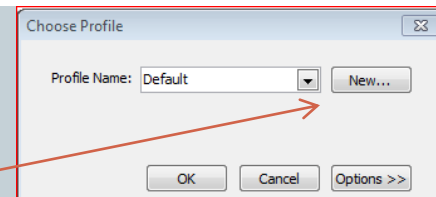
[http://computing.fnal.gov/xms/Services/Getting\\_Services/FermiMail/Calendar\\_Migration](http://computing.fnal.gov/xms/Services/Getting_Services/FermiMail/Calendar_Migration)

# Outlook Minimal Basics for Migration 1



## ➤ Open Application via Profile

- Profile sets up which email account being used.
- Profiles needed by migrator: 1 for each room to be migrated
- Should be done for you ahead of time, but just in case. Procedure:
  - Open Control Panel (or use “New...” on Choose Profile)
  - Select Mail
  - Select Show Profiles...
  - Check “Prompt...” and uncheck “Always use...”
  - Select Add...
  - Set profile name to whatever makes sense to you.
  - Fill “Your Name” with room name (does not have to be exact)
  - Fill “E-mail Address” with exact room email address
  - Skip the password entry, select Next...
  - Select “Use another account” and enter **your** SERVICES credentials
  - Select Finish
- Start up Outlook and select that profile
  - Authenticate with your SERVICES credentials
  - If you get an error “you do not have permission for this file”, then ask for help.



# Outlook Minimal Basics for Migration 2



## ➤ Create/Modify/Approve/Delete Meetings

- [http://computing.fnal.gov/xms/Services/Getting\\_Services/FermiMail/Calendar\\_Migration](http://computing.fnal.gov/xms/Services/Getting_Services/FermiMail/Calendar_Migration)

### Meeting Room Owner How-To

- [How to schedule a meeting](#)
- [Meeting room approver procedure](#)
- [How to migrate room data exporting from MeetingMaker and importing into FermiMail](#)

### Delegate Administrative Support Staff How-To

- [How to grant delegate access](#)

- Surprise: Do not cancel a recurring meeting. Set a new end-date instead.
  - Cancel meeting: can remove ALL past occurrences. Usually NOT what is desired.
  - There is no “cancel meetings going forward” option like other calendars.

## ➤ Exit, but first...

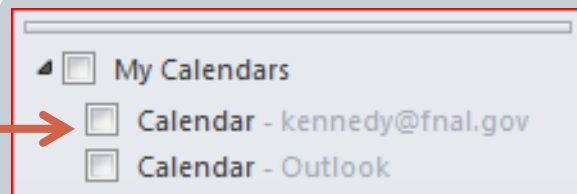
- “Send/receive all folders”
  - Push changes to server for others to see them “now”.
  - Otherwise, possible for mail/events to sit in your cache.
- OR, turn off caching.
  - Really only useful for computer with network ON/off/ON/off.



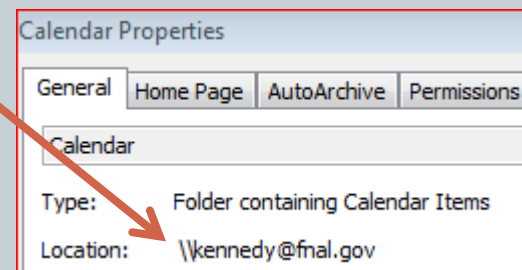
# Outlook Minimal Basics for Migration 3

## ➤ Server vs. Local Calendar

- Select calendar
- Right-click, select “Properties”
- Server calendar has email address in Location.
- Local calendar does not...
- Can upload a local calendar to server.
- Server calendar accessible elsewhere, by others.



Location: \\Outlook



## ➤ Room Admins Experience in Migration

- For migration, must have Full Access to room.
- This means a few temporary surprises:
  - Room will show up in your list of accounts on the left column while you have Full Access.
  - You will receive direct emails for the room while you have Full Access.
- This goes away once your perms return to Delegate for the room, after migration.

# Room Calendar Migration



## PRACTICE TIME

[http://computing.fnal.gov/xms/Services/Getting\\_Services/FermiMail/Calendar\\_Migration](http://computing.fnal.gov/xms/Services/Getting_Services/FermiMail/Calendar_Migration)

# Room Calendar Data Migration



## ➤ Prepare

- Procedures: Define and test, document, and communicate – ALL POSTED
- Data: Room Name and Properties, Workflow Config, Room Admin “Groups” - GATHERED
- Documentation: Create, test, and post to <http://computing.fnal.gov/FermiMail>

## ➤ Setup – will create closer to Flag Day 2 to avoid confusion

- Rooms: Name, properties, and workflow config
- *Permission groups – did not work as expected, so applying permissions to admins directly.*
- Room migration team tools – Outlook migration profile setup, *spell-check setting...*

## ➤ Execute – Flag Day

- Day before: Project will check on permissions, profile setup, and make rooms visible.
- Flag Day: Project will check with each migrator to be sure they can proceed (<10am)
  - Migrator: when done with a room, please send email to [exchange-proj@fnal.gov](mailto:exchange-proj@fnal.gov) saying so.
  - End of day: Project will remove permissions for completed rooms.

## ➤ Feedback

- Share experience and work-arounds

# Room Calendar Migration Practice



## ➤ Setup

- Setup Outlook configuration
- Setup Outlook profile

## ➤ Execute – Flag Day

### ➤ Export

- Pick a MM room you have proxy access to
- Export 1/1/2012 to 4/6/2015.
- Save intermediate file in Calendar Migration folder on Desktop.

### ➤ Convert

- URL should be a Favorite in IE browser
- Save intermediate file in Calendar Migration folder on Desktop.

### ➤ Import

- Pick a “Fake Room” by your seat number (1-15)
- Fake Room 16 is for Rob and Sheila for presentation.

### ➤ Polish

- If you have a list of private meetings in that room, then make those meetings private.

## ➤ Clean-up

- Delete Outlook profile
- Delete Outlook account settings
- Delete intermediate files in Calendar Migration folder.

# Reference Slides



**TO ADDRESS SPECIFIC QUESTIONS**

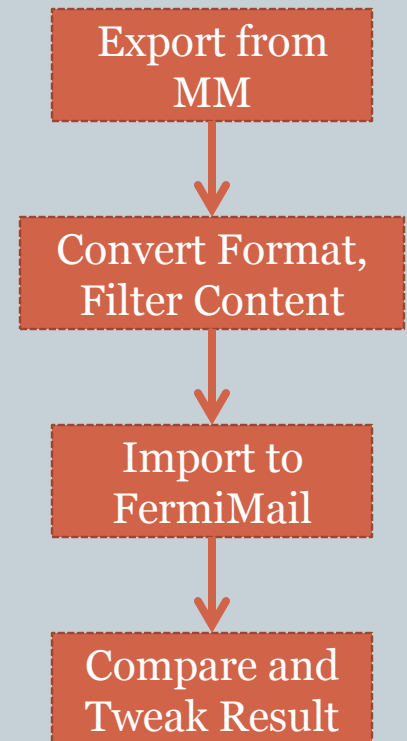
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# Meeting Room Calendar Data Migration Procedures



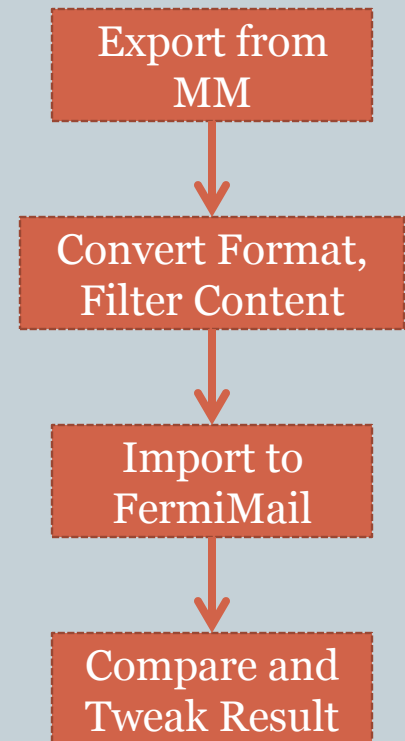
- Two procedures to choose from:
  - Manual Re-entry: easier, slower
  - Single Event Export/Import: must learn, faster
- Choose Manual Re-entry by default
- Choose Single Event Export/Import if:
  - More than 100 Events per migrator
    - Faster migration makes up for learn/practice time
  - Most Events have MANY Attendees
  - Need to preserve “cancelled meetings” info in past
- Export/Import will “fail”: < 1% Events
  - Certain recurrence patterns
  - Procedure → a list of what to manually re-enter



# Meeting Room Calendar Data: Manual Re-entry



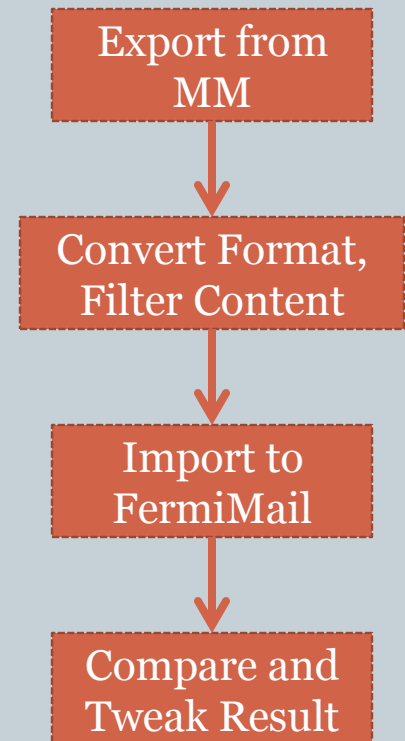
- Export an ICS file of Meetings in Room
  - Don't worry. We'll document how...
- Convert this to a compact Event Listing
  - 1 line per Event, recurring or not
- Manually re-enter Events into FermiMail
  - Summary, Times, Description, Attendees, etc.
  - Recurrence patterns: 1<sup>st</sup> and 3<sup>rd</sup> Wed → 2 Events
- Manually apply MM Options as needed
  - MM Options: Private, Reminder, Flexible, Labels
- Compare Meetings in FermiMail to MM
  - May tweak visibility (title only), etc.



# Meeting Room Calendar Data: Single Event Export/Import



- **Export an ICS file of Meetings in Room**
  - Don't worry. We'll document how...
- **Convert content to a zipfile of ICS files**
  - Zipfile contains a directory of 1-event ICS files
  - Also: report of Events requiring manual re-entry
- **“Update” Events 1-at-a-time into FermiMail**
  - GUI form with Attendees, cancelled meetings
  - Select new room, tweak options, and “Send Update”
- **Manually Re-enter ~1% of Meetings per list**
- **Manually apply MM Options as needed**
  - MM Options: Private, Reminder, Flexible, Labels
- **Compare Meetings in FermiMail to MM**
  - May tweak visibility (title only), etc.



# Calendar Data Migration: Some Caveats and Known Issues



## ➤ Export/Import Limitations

- Banners, to-do's, and similar specialty events not migrated **with calendar events**
  - **Semi-automatic procedures to move to-do's and banners...** requires some spreadsheet work.
- MM Options (private, reminder, flexible, labels) not migrated
- Some MM recurrence patterns not supported by FermiMail
  - Must translate into what IS supported
  - Example: 1<sup>st</sup> and 3<sup>rd</sup> Wednesday of month → 2 events: 1<sup>st</sup> Wed and 3<sup>rd</sup> Wed
  - Converter does this for you.

## ➤ User MM configuration not migrated

- Working hours, label values, etc.

## ➤ User Calendar Data Migration Service

- Must have access to user's Email/Calendar account
- Will not migration MM Options
  - Private events may be left visible until user fixes
- **ONLY March 2012 forward will be migrated**
  - Use archive approach to see older calendar data